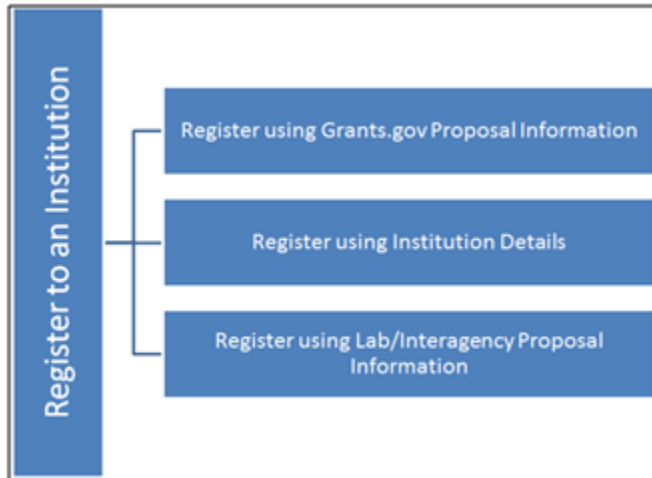


Register to an Institution

How Do I Register to an Institution in PAMS?


After you have created an account in PAMS, you can register to an institution in PAMS if you wish to submit proposals or work with previous submissions.



Registering to an institution is performed using one of the following options:

- Register using Grants.gov Proposal Information
- Register using Institution Information.

Register Using Grants.Gov Proposal Information

	<p><i>If you are already registered to an institution—or you do not want to register to an institution for any other reason (e.g., registering as a reviewer)—click the Cancel button on this screen.</i></p> <p><i>Upon doing so, you will be registered to PAMS but will not be registered to any institution.</i></p>
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To register to an institution using Grants.Gov proposal information, click the **My institution has submitted a proposal in Grants.gov. I am here**

to register as an **SRO, PI, or POC** link.


The next sections discuss the different roles available to you in PAMS and their respective requirements. Please review them before clicking the **Save and Continue** button.

I Want to Register as a PI for the Institution

The Principal Investigator (PI) is responsible for:

- Composing and submitting proposals in response to solicitations
- Overseeing the research activities supported by DOE awards.

Follow these steps to register as PI:

	<p><i>The proposal ID and email address should match the proposal ID and email address listed in the automated email sent by PAMS upon receiving the SF424 proposal, which was submitted via Grants.gov. Only one PI can register to the institution using the Grants.gov proposal information.</i></p>
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1. Enter **Proposal ID** and **Email** address.
2. Choose the *PI* role on the *Register to Institution* screen. Click the **Save and Continue** button.
3. If the first name and last name in your profile do not match the first name and last name on the SF-424, you will be prompted to enter the first name and last name from the proposal's SF-424. If applicable.
4. Upon successful verification, you will be navigated to the *Institutions* tab in the application.



At this point, you are registered as a PI for your specific institution. Additionally, you have been granted access to view the proposal that was used to register to the institution.

I Want To Register as an SRO to the Institution

The SRO role is usually held by a representative from the Sponsored Research Officer (SRO) responsible for submitting proposals to DOE Funding Opportunity Announcements and managing institution information and users in PAMS. In some institutions, the office represented is called the Business Officer (BO) or Administrative Officer (AO).

Follow these steps to register as SRO/AO/BO:




The proposal ID and email address should match the proposal ID and email address listed in the automated email sent by PAMS upon receiving the SF424 proposal, which was submitted via Grants.gov.

Only one SRO can register to the institution using the Grants.gov proposal information.

1. Enter *Proposal ID* and *Email* address.
2. Choose the **SRO/AO/BO** role on the *Register to Institution* screen. Click the **Save and Continue** button.
3. If the institution you wish to register to does not have an administrator in PAMS, you will be prompted to register as an administrator for the institution.

At this point you will be presented with the following three options:

- Register to the institution as an Administrative SRO/BO/AO.
 - Invite another user from the institution to register as an Administrative SRO/BO/AO.
 - Continue with the registration process and just get registered as an Administrative SRO/BO/AO.
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- If you choose to register as an Administrative SRO/BO/AO, click the check box to accept the agreement and click the **Save and Continue** button. This will take you to the *Institutions* tab.
 - If you choose to invite another user to register as an Administrative SRO/BO/AO to the institution, provide all mandatory inputs on screen (all fields marked by a red asterisk are mandatory) and click **Send Email**. This will take you to the *Institutions* tab.
 - If you simply want to register to the institution, you are taken to the *Institutions* tab.

	<p><i>At this point, you will be registered to the institution as an SRO. Depending on whether you chose to be the Administrative SRO/BO/AO or not, you will also have the Manage Institution and Manage Users privileges. Once you are registered as an SRO to the institution, you will have View and Manage Peer Access privileges to the Grants.gov proposal.</i></p>
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I Want To Register as a POC for the Institution

Follow these steps to register as a POC:



The proposal ID and email address should match the proposal ID and email address listed in the automated email sent by PAMS upon receiving the SF424 proposal, which was submitted via Grants.gov.

Only one POC can register to the institution using the Grants.gov proposal information.

1. Enter **Proposal ID** and **Email** address.
2. Choose the Point of Contact (POC) role option on the *Register to Institution* screen. Click the **Save and Continue** button.
3. Upon successful registration, you will be navigated to the *Institutions* tab.



At this point, you are registered to the institution as a POC. Additionally you will also be able to view the proposal.


Register Using Institution Information

This section covers two ways to register using institution information.

I Want to Register as a PI/Other User to the Institution

1. To register to an institution using institution information, click the *I know my institution and I am here to register to the institution* link.

2. Enter all mandatory information on the screen and click the **Search** button. Note that fields marked by a red asterisk are mandatory. Choose the *PI* or *Other* role.

	<p><i>The first bullet below states “Institution Name like.” The word like, as used here, means that if you are uncertain of the exact name of the institution you are searching for, you can enter a term that is similar to the name you want. For example, if you know that “Water” is part of the institution name (as in <u>Water</u>field Company or Waterman University), enter “water” in the search field and click Search. The system searches for and pulls up all institutions with “water” as part of the institution name.</i></p>
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- Institution Name like: Enter the Institution Name or at least a part of it
- EIN: Enter the Employer Identification Number
- DUNS: Enter the DUNS number.

3. If you find your institution listed in the grid, click the **Action** link and then click the **Add me to this Institution** link.
4. If you do not find your institution and have to create a new institution, click the **Cannot Find My Institution** button.
5. Enter mandatory inputs to create the institution and click the Create Institution button to create a new institution in PAMS. Note that fields marked by a red asterisk are mandatory.
6. Upon successful registration, you are taken to the Institutions tab in the application.



At this point, you are registered to the institution as a PI/Other User.

I want to Register as an SRO to the Institution

Follow these steps to register as an SRO:

1. To register to an institution using institution information, click the **I know my institution and I am here to register to the institution** link.
2. Enter all mandatory information on the screen and click the **Search** button. Note that fields marked by a red asterisk are mandatory. Choose the SRO role.



The first bullet below states “Institution Name like.” The word like, as used here, means that if you are uncertain of the exact name of the institution you are searching for, you can enter a term that is similar to the name you want. For example, if you know that “Water” is part of the institution name (as in Waterfield Company or Waterman University), enter “water” in the search field and click Search. The system searches for and pulls up all institutions with “water” as part of the institution name.

- Institution Name like: Enter the Institution Name or at least a part of it
- EIN: Enter the Employer Identification Number
- DUNS: Enter the DUNS number.

3. If you find your institution listed in the grid, click on the **Action** link followed by **Add me to this Institution**.

4. If the institution you wish to register to does not have an Administrative SRO/BO/AO in PAMS, you will be prompted to register as an Administrative SRO/BO/AO for the institution.

At this point you will be presented with the following three options:

- Register to the institution as an Administrative SRO/BO/AO.
- Invite another user from the institution to register as an Administrative SRO/BO/AO.
- Continue with the registration process and just get registered as an Administrative SRO/BO/AO.
- If you choose to register as an Administrative SRO/BO/AO, click the check box to accept the agreement and click the **Save and Continue** button. This will take you to the *Institutions* tab.
- If you choose to invite another user to register as an Administrative SRO/BO/AO to the institution, provide all mandatory inputs on screen (all fields marked by a red asterisk are mandatory) and click **Send Email**. This will take you to the *Institutions* tab.
- If you simply want to register to the institution, you are taken to the *Institutions* tab.

5. Upon successful registration, you will be navigated to the *Institutions* tab in the application.

6. If you do not find your institution and have to create a new institution, click the **Cannot Find My Institution** button.

7. Provide mandatory inputs to create the institution and click the **Submit** button to create a new institution in PAMS. Note that fields marked by a red asterisk are mandatory.

8. Upon successful registration, you are taken to the *Institutions* tab.

	<p><i>At this point, you are registered to the institution as an SRO.</i></p>
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Register to Multiple Institutions

If you are associated with more than one institution, you can simply go to your *Institutions* tab, click **Register to Another Institution** to search for your institution, and register to it in PAMS. This might be required when a user is associated with an institution and has a small business, or when a user is associated with a lab and with a university, etc.